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Agenda Item No. B-5	USSR: Merchant Fleet Liner Operations in 1984	25X
		25X1

Working Group Paper

Office of Global Issues Directorate of Intelligence

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USSR:	Merch	ıant F	leet	Liner
Operat	ions ir	า 1984	1	

Summary

The number of international cargo lines run by Soviet steamship companies pushed from 71 in December 1983 to a new high of 80 at the end of 1984. This represents a dramatic recovery since 1980 when the number of lines dropped to 63 following withdrawal of Soviet lines from US trade after the invasion of Afghanistan.

As in 1983, the number of lines in the cross trades between non-Soviet ports exceeds the number in Soviet foreign trade. With most Soviet lines operating outside the conference system, only six currently function as conference members.

During 1984, the number of lines offering fast turnaround container, roll-on/roll-off (ro/ro), or barge carrier service rose from 47 to 59, leaving only 21 that offer purely breakbulk service.

Twelve new lines were added and three old ones dropped. The new lines will add little to competitive pressures on Free World shipowners. Ten carry largely Warsaw Pact or Soviet client country cargoes; only two carry cross trade goods in the commerce of developed countries.

Ten of the new lines, one using new feeder barge carriers, are fast turnaround. In addition, service on three existing container or breakbulk lines was upgraded by the assignment to them of ro/ro ships and another existing breakbulk line began to offer container service.

Eight new large (over 7,500 deadweight tons) fast turnaround ships joined the liner fleet in 1984 (four containerships and four barge carriers). No large ro/ro ships were acquired.

Soviet use of two of their largest ro/ro ships for inefficient short-haul service to Western Europe ended in 1984 with assignment of the vessels to the Baltic-Cuba run. In the Far East, major containerships continue to be used for short voyages between Soviet Pacific ports and Japan.

In at least two important trades, disputes between nonconference Soviet lines and ratesetting conferences whose members want to limit the impact of Soviet rate cutting on their business caused problems in 1984. Talks in June between Soviets and officials of the conference that dominates trade between Europe and the Far East on possible Soviet

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membership in that conference accomplished nothing, and talks in July with the conferences in the Europe–East Africa trade ended similarly. No comparable difficulties arose over the roles of Soviet carriers in the Japan–Australia and Europe–Central America trades, which have been trouble spots in the past.

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In 1984, the number of international cargo lines operated by the Soviet Ministry of the Maritime Fleet pushed to 80, a new high. The previous peak figure—74—was achieved in 1979, but in 1980 after the invasion of Afghanistan Soviet lines in US trade had to be disbanded or rerouted, causing a drop in the total to 63 (see tables 1-4). Of the lines functioning at the end of 1984, 39 were services engaged predominantly in the carriage of other countries' cross-trade cargoes. Among the remaining lines, 33 were devoted chiefly to movements in the USSR's foreign trade. The status of the remaining eight is unclear. Soviet participation in ratesetting "conferences" remained at a low level in 1984. Only six Soviet lines—all of them in the cross trades—were full conference members, charging conference rates and accepting conference limits on sailings and cargo carried in the trades involved. The pace of Soviet efforts to improve service on their cargo lines by adding ships and cargo-handling systems that reduce ship turnaround time in ports picked up in 1984. As a result, the number of lines offering fast-turnaround service rose from 47 to 59. Among these, the number of lines offering ro/ro service grew from 10 to 16; the number offering both ro/ro and container service went up from 13 to 16; the number offering container service increased from 23 to 25; and the number offering container service increased from 23 to 25; and the number offering container service increased from 23 to 25; and the number offering container service increased from 23 to 25; and the number of service involving the use of specialized ships and/or the carriage of cargo in containers. Services Added or Dropped The increase of nine in the number of Soviet international cargo lines resulted from the opening of 12 new lines and the disbanding of three preexisting lines. 125X1 In most cases, the opening of the new lines in 1984 will add little in the way of cross-trade competition for West European and Japanese liner operators. Seven are devoted		USSR: Merchant Fleet Liner Operations in 1984	25X1
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Five of the new lines offer purely ro/ro service. These include: two Estonian Steamship Company lines from Soviet Baltic ports—one to Finland and one to Norway and Denmark, a Black Sea Steamship Company line from the Black Sea to Egypt, a feeder service by a Baltic steamship company ro/ro for the distribution of Soviet automobiles from a terminal in Panama to customers in the Caribbean area, and a unique seasonal service by ice-reinforced ships of the Murmansk Steamship Company linking Soviet Baltic ports with the west coast of Canada via the Northern Sea route.	25X1
Three other new lines offer container service. These include a cross-trade ine of the Black Sea Steamship Company between Cuba and India; an Azov-based line from the Black Sea to North Africa, Spain, and the west coast of Italy; and a container-carrying variant of the Far East Steamship Company's Japan-Southeast Asia-India line.	25X1
The remaining new lines include a mixed ro/ro-container service by ships of the Black Sea Steamship Company from Italy to Aqaba, Jordan; a conventional breakbulk service of the same company from Southeast Asia to Red Sea, Mediterranean, and West European ports; a joint conventional service from Soviet Baltic ports to Cuba by ships of the Baltic Steamship Company and Empresa Cubana; and an innovative barge carrier feeder service of the Danube Steamship Company that moves barges and containers with cargoes for or from Danube riparian countries between the mouth of the Danube and ports on the Red Sea and eastern Mediterranean.	25 X 1
The three lines that appear to have been disbanded during 1984 include a Baltic Steamship Company service from the Baltic to Nigeria, a Danube Company service from Soviet ports in the Danube delta to North Africa, and a Black Sea Steamship Company ro/ro service from Soviet Black Sea ports to Bulgaria, Greece, the west coast of Italy, Algeria, and Libya.	25X1
During 1984, three existing lines were upgraded by the assignment of ro/ro ships. They are the Soviet Baltic-Western Europe-Eastern Mediterranean (SAGA MEDITERRANEAN) service operated by the Estonian	

Changes to Existing Lines

During 1984, three existing lines were upgraded by the assignment of ro/ro ships. They are the Soviet Baltic-Western Europe-Eastern Mediterranean (SAGA MEDITERRANEAN) service operated by the Estonian Steamship Company, the same company's Soviet Baltic-east coast of Sweden-Norway line, and the Latvian Steamship Company's RINELA line from the Soviet Baltic, Western Europe, and the east coast of the United Kingdom to the eastern Mediterranean. In addition, the Far East Steamship Company upgraded its conventional FESCO STRAITS PACIFIC line by offering container service.

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	Some of the more important changes to the itineraries of existing lines in 1984 were: the adding of calls in Western Europe by ships on the Latvian Steamship Company's Soviet Baltic-Ireland-west coast of United Kingdom ro/ro-container service; the addition of calls at Scandinavian ports by ships of the Murmansk Steamship Company's ARCTIC line from Communist Baltic ports and Western Europe to Canadian east coast and Great Lakes ports; and the dropping of calls in Zaire by Estonian Steamship Company ships on the line from Soviet Baltic and West European ports to Angola.	25X1
Additions to the Liner Fleet	The number of major units added to the USSR's fleet of fast-turnaround vessels suitable for transoceanic service rose from five in 1983 to eight in 1984, bringing the total to 49 (see table 5). All of the ships acquired in this category were cellular container ships and barge carriers. Although large multipurpose ships with limited ro/ro capacity and small purely ro/ro vessels under 7,500 deadweight tons (DWT) continue to enter the fleet, no large specialized ro/ros have entered the fleet since 1982. The large full container ships added in 1984 included two of the 16,000 DWT East German-built Kapitan Gavrilov-class and two of the Bulgarian-built Simon Bolivar-class—9,400 DWT. The Gavrilovs were both assigned to major lines between Europe and the Far East; the Bolivars to Black Sea-Mediterranean service.	25X1
	During 1984, the fleet acquired its first feeder barge carriers, two units of the 8,730 DWT Anatoliy Zheleznyakov-class built in Italy and two of the 8,640 DWT Boris Polevoy-class built in Finland. The new feeder barge carriers will service a line from the mouth of the Danube to ports on the eastern Mediterranean and the Red Sea.	25X1
Changes in Ship- Use Patterns	No major changes occurred during 1984 in the employment of the larger fast-turnaround ships that constitute the cutting edge of the USSR's liner fleet (see table 6). The only shift among the 15 large ro/ro ships was the transfer of two Magnitogorsk-class vessels from uneconomic short-haul service between the Soviet Baltic and Western Europe to the long-haul line from the Baltic to Cuba. As a result, all big Soviet ships of this type are again being used on appropriately long routes.	25X1
	No shifts of container ships larger than 7,500 DWT took place during the year, but evidence of underemployment of certain units persisted. On the	

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USSR's Pacific coast, three Pula-class ships continued to operate on the short-haul route between the ports of Nakhodka and Vostochnyy and

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Japan.

Relations With Western Shipowners Over Rate Cutting

Although working arrangements between Soviet lines and their West European and Japanese competitors in certain trades have maintained commercial peace since 1983, new contention over Soviet rate cutting and trade intrusion has led to friction in other key trades. The greatest problem, according to West European and Scandinavian owners, exists in Europe's trade with Southeast Asia and the Far East. Conference lines in this trade belong to the powerful Far East Freight Conference (FEFC) whose members were pressing for meetings with the Soviets at the end of 1983. Conference member concerns center on the activities of the Baltic Steamship Company's BALTORIENT container line which offers weekly sailings between Western Europe, Southeast Asia, and Hong Kong. At the end of 1984, 12 of the USSR's 22 largest container ships were assigned to BALTORIENT. Spokesmen for West European shipowners claimed during 1984 that Soviet ships were moving 6 percent of all possible trade on the route.

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In June 1984, talks between Soviet merchant fleet officials and representatives of the FEFC over conditions for possible Soviet membership in the conference broke down with no conclusive results. In September, the conference announced a series of rate reductions. According to press reports, these cutbacks are attributable more to competition from two major nonconference Taiwanese steamship companies—Evergreen Maritime Corporation and Yang Ming—than to the Soviet presence. The Taiwanese container ships are much larger than the USSR's biggest and their services are far more efficient.

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The only other trade in which frictions between Western conference lines and a Soviet line operating outside the conference system remain close to the surface is that between Western Europe and East Africa where rate cutting by the Baltic Steamship Company's Baltic–East Africa line (BESTA) has been a sore point in the past. According to a recent OECD report, BESTA carries about 13 percent of the liner cargoes moving from Western Europe to East Africa. Talks during July between Soviet merchant fleet representatives and conference officials in the East African trade on proposed conference membership for BESTA ended in a stalemate.

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The May 1983 working arrangement between the Soviet Far East Steamship Company and liner conferences in the Japan–Southeast Asia–Australia trade that set a quota on Soviet participation in the trade and a floor on Soviet rate cutting continued into 1984. During that year the Soviet Far East Steamship Company agreed to raise the rates charged by its Japan-Australia container service and asked in return for an increase in its allotted share of the trade. This matter was to be taken up at a meeting in Tokyo at the end of November between the Soviets and conference spokesmen, but the outcome of that meeting, if it actually occurred, is not known.

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In trade between Western Europe and Central America, where the
USSR's BALTCAPAS line operates under an agreement with the confer-
ences involved as a "tolerated outsider," no problems were reported
during 1984.

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Table 1
USSR: International Cargo Lines Operated
Unilaterally by Soviet Steamship Companies,
31 December 1984

Company	Route
Murmansk	Soviet Baltic/Western Europe-Canadian St. Lawrence and Great Lakes (ARCTIC LINE) a c
Murmansk	Soviet Baltic-Northern Sea route-west coast Canada d
Baltic	Soviet Baltic/Finland/East Germany-Mediterranean Europe-Australia (BALT AUSTRALIA) b c d
Baltic	New Zealand westbound to Western Europe b d
Baltic	Soviet Baltic/Western Europe-Central America/Venezuela/West Indies-Peru (BALTCAPAS) a c
Baltic	Panama-Caribbean (CARIBBEAN FEEDER SERVICE) d
Baltic	Soviet Baltic-Netherlands/Belgium-Finland (BALT-SCAN) a c
Baltic	Soviet Baltic-east coast United Kingdom (Hull) -West Germany- East Germany ⁴
Baltic	Soviet Baltic-West Germany-east coast United Kingdom (London) (TRANS-SIBERIAN CONTAINER SERVICE) a c
Baltic	Soviet Baltic-Western Europe-United Kingdom-Cuba d
Baltic	Soviet Baltic-east coast United Kingdom (London) -Belgium- Netherlands-Finland a c d
Baltic	Soviet Baltic-Western Europe/east coast United Kingdom (London) -Red Sea-Southeast Asia/Hong Kong (BALTORIENT) ac
Baltic	Soviet Baltic-Western Europe-east coast Canada (BALT CANADA) a c d
Baltic	Soviet Baltic-Finland-Sweden-Italy-Greece-Western Europe (SCAN-MED-CONT) a
Baltic/Latvian	Soviet Baltic/Western Europe-Portugal/Spain (PORTOBALTICA) a c d
Baltic/Estonian	Soviet Baltic/Western Europe-East Africa/Indian Ocean (BESTA)
Estonian	Soviet Baltic/Western Europe-eastern Mediterranean (SAGA MEDITERRANEAN) ad
Estonian	Soviet Baltic-east coast Sweden-Norway-West Germany cd
Estonian	Soviet Baltic-Norway-Sweden-eastern Mediterranean (SCANLEVANT) a
Estonian	Soviet Baltic-Finland-Denmark-Norway c d
Estonian	Soviet Baltic-Denmark-Norway d
Estonian	Soviet Baltic-Finland d
Estonian	Soviet Baltic-Western Europe-Angola d
Latvian	Soviet Baltic-east coast United Kingdom (London) -Western Euro- pe-North Africa (RICONA LINE) a
Latvian	Soviet Baltic-Western Europe-Ireland-west coast United Kingdom (Ellesmere Port) a c d
Latvian	Soviet Baltic-West Germany-Belgium-France-Netherlands d
Latvian	Denmark/Western Europe/east coast United Kingdom (London) - eastern Mediterranean (RINELA) bcd
Danube	Soviet Danube-Jordan
Danube	Soviet Danube-Near East (Lebanon, Syria, Egypt, and Cyprus)
Danube	Soviet Danube-Greece
Danube	Soviet Danube-Turkey a c

Table 1 **USSR: International Cargo Lines Operated** Unilaterally by Soviet Steamship Companies, 31 December 1984 (continued)

Company	Route		
Black Sea	Western Europe/west coast United Kingdom (Bristol) -Red Sea-India/Pakistan (BLASCO INDOSTAN LINE)		
Black Sea	Soviet Black Sea-Persian Gulf d		
Black Sea	Soviet Black Sea-Syria d		
Black Sea	Italy-Jordan a c d		
Black Sea	Soviet Black Sea-Turkey-Jordan-Vietnam-Japan-Southeast Asia-Red Sea-Mediterranean (BLASCO ORIENT) a c d		
Black Sea	Soviet Black Sea-Egypt d		
Black Sea	Soviet Black Sea-Vietnam-Cambodia		
Black Sea	Soviet Black Sea-Cuba		
Black Sea	Cuba-South Asia a c		
Black Sea	Mediterranean-Red Sea-Southeast Asia/Hong Kong-South Asia (ODESSA OCEAN LINE CONTAINER SERVICE) a c		
Black Sea	Soviet Black Sea-Pakistan-India-Bangladesh-Sri Lanka-Red Sea- Mediterranean (ODESSA OCEAN LINE)		
Black Sea	Southeast Asia-Red Sea-Mediterranean-Western Europe a		
Black Sea	Soviet Black Sea-Red Sea/East Africa cd		
Azov	Soviet Black Sea-Libya d		
Azov	Soviet Black Sea-Jordan d		
Azov	Soviet Black Sea-Greece-east coast Italy-Egypt (AZMED) a c		
Azov	Soviet Black Sea-Greece-east coast Italy c		
Azov	Soviet Black Sea-Red Sea-East Africa-east coast Italy (AZRED) c		
Azov	Soviet Black Sea-Turkey-Yugoslavia-east coast Italy-Greece (ASADCO) a c		
Azov	Soviet Black Sea-east coast Italy-Greece-Cyprus-Syria-Lebanon (ADMED) c		
Azov	Soviet Black Sea-Spain-west coast Italy-Greece (ASITCO) a c		
Azov	Soviet Black Sea-North Africa-Spain-west coast Italy c		
Azov	Soviet Black Sea-east coast Italy-Greece-Turkey-Egypt a c		
Caspian	North Sea-Baltic-Iran (Caspian) (via Volga-Baltic Waterway) (CASPIAN VOLGABALT LINE) a		
Caspian	Mediterranean-Iran (Caspian) (via Volga-Don Canal) (MEDITERRANEAN CASPIAN LINE) a c		
Far East	Hong Kong-Southeast Asia-Japan-Soviet Far East-west coast Canada (FESCO STRAITS PACIFIC) a c		
Far East	Soviet Far East/Japan-Southeast Asia/India (FESCO INDIA) a		
Far East	Soviet Far East/Japan-Southeast Asia/India (FESCO INDIA CONTAINER SERVICE) a c		
Far East	Soviet Far East-Hong Kong a c		
Far East	Soviet Far East-Japan-Hong Kong-Philippines-Australia (FESCO AUSTRALIA LINE) a c		

^a An independent line operating entirely or predominantly in the cross (or transit) trades.

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^b A conference line operating entirely or predominantly in the cross trades.

c Line offering full or partial container service.

^d Line offering full or partial roll-on/roll-off service.

[·] Line served by barge carriers.

Table 2 **USSR: International Cargo Lines Operated** Jointly by Soviet and Foreign Steamship Companies, 31 December 1984

Soviet Company	Route	Nationality of Foreign Partners
Baltic	Soviet Baltic-east coast United Kingdom (Hull/Tilbury) ^{c d}	British
Baltic	Soviet Baltic/Western Europe-east coast South America (BALT AMERICA) ^b	Polish and East German
Baltic	Soviet Baltic-Argentina	Argentine
Baltic	Soviet Baltic-Cuba	Cuban
Estonian	Soviet Baltic/Western Europe-West Africa (UNIAFRICA) ^{b d}	Polish and East German
Latvian	Soviet Baltic-East Germany cd	East German
Latvian	Soviet Baltic-France (Atlantic) c d	French
Latvian	Soviet Baltic-Netherlands a c	Dutch
Latvian	Soviet Baltic-Belgium a c	Belgian
Lithuanian	Soviet Baltic-West Germany	West German
Danube	Soviet Black Sea-Pakistan-India-Sri Lanka- Southeast Asia (INTERLIKHTER) •	Bulgarian, Hungarian, and Czechoslovak
Danube	Soviet Black Sea-eastern Mediterranean-Red Sea ce	Bulgarian, Hungarian, and Czechoslovak
Black Sea	Soviet Black Sea-Bulgaria c d	Bulgarian
Black Sea	Soviet Black Sea-India/Pakistan c	Indian
Black Sea	Soviet Black Sea-France (Mediterranean)	French
Black Sea	Soviet Black Sea-Sri Lanka	Sri Lankan
Azov	Soviet Black Sea-west coast Italy (ITAZOV)	Italian
Azov	Soviet Black Sea-Algeria	Algerian
Far East	Soviet Far East-Japan a c	Japanese

a An independent line operating entirely or predominantly in the cross (or transit) trades.

A conference line operating entirely or predominantly in the cross

c Line offering full or partial container service.

d Line offering full or partial roll-on/roll-off service.

[·] Line served by barge carriers.

Table 3
USSR: Changes in International Liner Network,
1979-1984

	30 April 1979	30 April 1980	30 April 1981	30 April 1982	31 De- cember 1982	31 De- cember 1983	31 De- cembe 1984
Total	74	63	66	69	71	71	80
Trade							
Largely or entirely Soviet	26	25	28	27	28	28	33
Unclear	4	4	5	4	7	7	8
Predominantly cross	44	34	33	38	36	36	39
Conference	7	5	7	7	7	7	6
Independent	37	29	26	31	29	29	33
Cargo handling mode							
Conventional breakbulk	32	28	28	30	26	24	21
Fast turnaround	42	35	38	39	45	47	59
Barge carrier	0	1	1	1	1	1	1
Container	23	17	19	18	22	23	25
Mixed container and barge carrier	0	0	0	0	0	0	1
Mixed container and roll-on/roll-off	10	8	8	10	13	13	16
Roll-on/roll-off	9	9	10	10	9	10	16

Table 4
USSR: Employment of International Cargo Lines,
31 December 1984

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Trade	Total	Cargo Handling Mode								
		Conventional	Fast Turnaround							
		Breakbulk	Total	Container	Ro/Ro	Mixed Container and Ro/Ro	Mixed Container and Barge Carrier	Barge Carrier		
Soviet bilateral	33	13	20	4	12	4	0	0		
Unclear	8	1	7	1	1	3	1	1		
Cross and transit	39	7	32	20	3	9	0	0		
Conference	6	1	5	0	2	3	0	0		
Independent	33	6	27	20	1	6	0	0		
Total	80	21	59	25	16	16	1	1		

Table 5
USSR: Fast-Turnaround Liner Vessels
Suitable for Transoceanic Service^a

Type and Class	Deadweight (tons)	Container Capacity (TEUS) ^b	Speed (knots)	Number in Service 31 December 1984	Total Deadweight (tons)	Total Container Capacity (TEUS)
Total				49	823,320	41,076
Total fully cellular container ships				27	380,000	19,756
Kapitan Gavrilov	16,000	940	21.6	8	128,000	7,520
Khudozhnik Saryan	14,500	732	20.8	10	145,000	7,320
Modified Pula	15,000	704	18.0	4	60,000	2,816
Simon Bolivar	9,400	420	18.0	5	47,000	2,100
Total roll-on/roll-off ship	18			15	292,000	15,357
Magnitogorsk	21,000	1,368	22.0	4	84,000	5,472
Kapitan Smirnov	20,000	1,231	27.0	3	60,000	3,693
Skulptor Konenkov	18,500	774	20.5	8	148,000	6, 192
Total Barge Carriers				7	151,320	5,963
Yulius Fuchik	37,850	1,312	19.0	2	75,700	2,624
Aleksey Kosygin	40,880	1,287	18.4	1	40,880	1,287
Anatoliy Zheleznyakov	8,730	513	12.5	2	17,460	1,026
Boris Polevoy	8,640	513	13.4	2	17,280	1,026

a Including only vessels larger than 7,500 DWT and excluding multipurpose ships.

b Twenty-foot equivalent units.

Table 6
Disposition of Soviet Transoceanic Cellular
Container, Roll-on/Roll-off, and
Barge-Carrying Ships

Employment	30 April 1981				31 December 1982			
	Container	Ro/Ro	Barge- carrying	Total	Container	Ro/Ro	24.90	Tota
Liner (by route)				,			carrying	<u> </u>
Soviet Baltic-Western Europe-South Asia or Southeast Asia/Japan	7	0	0	7	9	0	0	9
Soviet Baltic-Western Europe-east coast Canada and/or Caribbean	0	7	0	7	0	4	0	4
Soviet Baltic-Western Europe and/or Mediterranean	0	0	0	0	2	1	0	3
Sovet Baltic-Mediterranean Europe- Australia-New Zealand	0	0	0	0	0	4	0	4
Soviet Black Sea-South Asia or Japan/Southeast Asia-Red Sea-Mediterranea	0 an	5	2	7	0	6	2	8
Soviet Black Sea-Mediterranean and/or Cuba or Red Sea	0	0	0	0	0	0	0	0
Japan-Southeast Asia-Australia	4	0	0	4	5			
Japan-Soviet Far East	3	0	0	3		0	0	5
Tramping coastal trade, unknown and other	0	0	0	0	0	0	0	0
Total	14	12	2	28	18	15		
Employment	31 Decemb	er 1983			31 Decemb		2	35
	Container	Ro/Ro	Barge- carrying	Total	Container	Ro/Ro	Barge-	Total
iner (by route)							carrying	
Soviet Baltic-Western Europe-South Asia or Southeast Asia/Japan	11	0	0	11	12	0	0	12
Soviet Baltic-Western Europe-Canadian east coast and/or Caribbean	0	2	0	2	0	4	0	4
Soviet Baltic-Western Europe and/or Mediterranean	2	2	0	4	2	0	0	2
oviet Baltic-Mediterranean Europe- ustralia-New Zealand	0	5	0	5	0	5	0	5
oviet Black Sea-South Asia or Japan/ outheast Asia-Red Sea-Mediterranean	2	5	2	9	3	6	2	11
oviet Black Sea-Mediterranean and/or Cuba r Red Sea	0	0	0	0	3	0	4	7
apan-Southeast Asia-Australia	4	0	0	4	4			
apan-Soviet Far East	3	0	0	3	3	0	0	4
ramping coastal trade, unknown and ther	1	1	1	3	0	0	1	3 1
otal	23	15						

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